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SUMMARY OF TRADE AND TARIFF INFORMATION

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Prepared in Terms of the Tariff Schedules of the United States

TOWELS AND WASHCLOTHS

TSUS Items
365.78(pt.), -365.83,
366.18 -366.39, 366.60 (pt.),
and 366.65 (pt.)

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UNITED STATES INTERNATIONAL TRADE COMMISSION

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FOREWORD

Each Summary of Trade and Tariff Information is part of a series published by the United States International Trade Commission to provide information on conditions of competition between domestic and foreign products. This report, generally covering the period 1976 through 1980, is one of many being published in the current series of summaries.

This series provides comprehensive coverage of product uses, the domestic industry, U.S. consumption, production, and trade, and the competitiveness of U.S. producers in domestic and foreign markets in each commodity area. The summaries are cast in terms of the Tariff Schedules of the United States (TSUS).

The current series will consist of approximately 250 individual reports. The Commission will issue updated statistical tables and industry status reports as appropriate for individual summaries. The overall program will run several years, ultimately covering all items of the TSUS.

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Executive Summary

This summary covers towels and washcloths, virtually all of which are made wholly or chiefly of cotton. Nearly all towels and washcloths are made from woven pile and nonpile fabrics; pile towels account for the largest share of the trade. Also included in this summary are industrial wiping cloths known as shop towels, which are treated separately in this summary since they are distinctly different from the other towels in terms of cost, quality, and end use.

U.S. rates of duty on towels and washcloths in 1982 will range from a low of 3.9 percent ad valorem to a high of 27.5 percent ad valorem. The average rate, based on 1980 imports, is 13.8 percent ad valorem. Imports of cotton towels are subject to control under the Multifiber Arrangement. Although towels and washcloths are not eligible for duty-free treatment under the Generalized System of Preferences, certain towels imported from the least developed developing countries are eligible for preferential LDDC rates of duty. Based on 1980 trade, such imports accounted for less than 1 percent of total towel imports.

U.S. producers' shipments of towels and washcloths are concentrated among five firms, which account for 80 percent of total shipments. The four largest firms are fully integrated textile manufacturers producing a wide variety of textile products. Towel production is located primarily in the Southeast.

Apparent U.S. consumption of towels and washcloths averaged 144 million dozen in 1976 and 1977 and declined to an average of 111 million dozen in 1978 and 1979 and to 102 million dozen in 1980. U.S. producers' shipments followed a similar trend, declining from an average of 138 million dozen in 1976 and 1977 to 104 million dozen in 1978 and 1979 and then to 94.4 million in 1980. The decline in consumption and production occurred mostly in low-valued towels used primarily by the institutional trade. U.S. producers supply all but a small part of the towels consumed in households, because of their fashion leadership and competitive prices. Imports supply about a third of the terry towels used by the institutional trade.

Imports of towels and washcloths increased 28 percent, from 6.9 million dozen in 1976 to 8.8 million dozen in 1980. Towels for use by the institutional trade accounted for 70 percent of the total quantity of imports in 1980, compared with 61 percent in 1976. Imported institutional towels consisted primarily of pile towels, and those intended for household use consisted mostly of nonpile kitchen or dish towels. The major foreign supplier of towels in 1976-80 was Pakistan, whose share of total imports rose from 29 percent in 1976 to 46 percent in 1980. India, the second largest supplier in the period, accounted for 17 percent of the imports in 1980.

U.S. exports, consisting primarily of household towels and washcloths, more than doubled, increasing from $23 million in 1976 to $50 million in 1980. In terms of quantity, they averaged 1.5 million dozen annually, or less than 2 percent of U.S. producers' annual shipments.

Description and Uses

Commodity	TSUS item No.
Ornamented towels and washcloths:	
Of cotton	365.78 (pt.)
Of vegetable fibers, except cotton	365.83
Not ornamented towels:	
Of cotton:	
Pile or tufted construction	366.18- .24
Other	366.27
Of vegetable fibers, except cotton	366.30- .39
Not ornamented washcloths of cotton, pile or tufted construction:	
Velour	366.60 (pt.)
Terry	366.65 (pt.)

Note.--For the statutory description, see excerpt from the Tariff Schedules of the United States Annotated (1982) in app. A. A concordance of the provisions of the Tariff Schedules of the United States (TSUS) items included in this summary with related categories in production, export, and other import nomenclatures is found in app. B.

This summary covers towels and washcloths, with towels accounting for approximately 90 percent of the shipments covered here, and washcloths, for the remainder. Towels and washcloths are classified in the marketplace as either household or institutional. Household towels and washcloths are used in the home and institutional towels and washcloths are used by commercial and institutional establishments, such as hospitals, hotels, country clubs, barber shops, and beauty salons. For purposes of this summary, these users will be referred to as the household and the institutional markets.

Virtually all towels and washcloths are made wholly or chiefly of cotton. 1/ In addition, nearly all towels and washcloths are made from woven fabrics of pile or nonpile construction, with those of pile construction accounting for the largest share of the trade.

Pile towels, known primarily as terry or turkish towels, have uncut loops of warp yarns projecting from both sides of the towel. The more loops, the greater the absorbency of the towel. Towels made with the pile loops sheared on one side are known as velour towels, which are used primarily as bath towels and hand towels. Terry towels are used not only as bath and hand towels, but also as kitchen or dish towels and as bar mops, which generally have double loops to provide 60 to 70 percent additional absorbency.

Towels made from woven nonpile fabrics consist primarily of huck and crash towels. Crash towels are coarse, plainwoven towels with rough surfaces, and are used primarily as dish towels. Huck towels are basically hand and

1/ In 1980, domestic production of towels and washcloths was the second largest end use of cotton, accounting for 620,000 bales, each weighing 480 pounds.

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face towels used largely by the institutional trade. They are absorbent and durable, and have a honeycomb texture or pebbly surface resulting from the weave. Huck toweling is also made in continuous lengths for use in public restrooms.

Shop towels are also included in this summary, but they are distinctly different from all other towels under consideration in terms of cost, quality, and end use. Shop towels are low-cost industrial wiping cloths used primarily in commercial and industrial establishments for cleaning machine parts and other articles and then laundered for further use. 1/ They are made from plainwoven fabrics such as Osnaburg, a fabric woven with few yarns per inch.

Towels and washcloths are made in a variety of sizes. Bath towels are typically 25 by 50 inches; hand towels, 16 by 26 inches; and washcloths, 12 by 12 inches. Towels and washcloths are produced in a wide variety of colors, including reversible colors, and with elaborate woven designs and borders. They are often embellished with lace or machine-embroidered trimming, appliques, 2/ scalloped edges, monograms, or combinations. These features are found primarily in household pile towels and washcloths. Institutional towels and washcloths, on the other hand, are usually made of solid color, mostly white, often with the name of the institution woven into the towel to increase recognition and establish ownership.

Terry towels and washcloths are made with two warp yarns (lengthwise) and one filling yarn (crosswise). The foundation or ground fabric is made when the filling yarns are interlaced at right angles with one set of the warp yarns. During the weaving process, the other set of warp yarns is relaxed and pushed into loops between the filling yarns to form the pile. The proper strength of the yarns (ground warp and fillings) and the tightness of weave assure durability. The parallel edges of towels are either finished with a selvage or hemmed. The selvage (i.e., the edge on either side of a towel) is formed when filling yarns are looped around and bound into the warp yarns. The narrow ends of towels are either hemmed or fringed. Due to the small size of washcloths, the edges are overcast (i.e., a slanted stitch around cut edges to prevent raveling).

Nonpile towels are constructed with a filling yarn passing successively over and under each warp yarn, alternating each row. By varying the number and type of warp and filling yarns, different types of towels can be produced. The pebbly surface of huck towels results from loosely twisted yarns. Crash towels are made with coarse, uneven yarns creating a rough, irregular surface.

The strength of the yarns used is probably the most important variable. The ground warp in most pile towels is made of ply yarns (two or more yarns that have been twisted together), enabling the towels to withstand the loom tension and the strain from use. The loops forming the pile of many better grade terry towels are made with loops of two parallel threads, rather than

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1/ Excluded from this summary are wiping rags, which have uses similar to those of shop towels but which are used only once and then discarded.

2/ A decoration or design made separately and then embroidered, pasted, or sewn on a fabric.

twisted threads, making the towels more durable and absorbent. By contrast, many inexpensive towels are made with loops of a single thread. Although cotton pile yarns are used because of their absorbency, several domestic manufacturers in the early 1970's began adding polyester yarns in the ground warp to increase the strength and durability of the towel without significantly affecting its absorbency. Other factors determining the quality of towels include the tightness of weave, the firmness and evenness of the selvage, and the overall appearance.

Generally, domestically made towels are of better quality than most imported towels. The imports consist primarily of institutional towels, where price is the principal factor in the purchasing decision.

Customs Treatment

U.S. customs treatment

The rates of duty applicable to imports of towels and washcloths are shown in the following table. Part 5C of schedule 3 of the TSUSA which includes towels and washcloths is provided in appendix A.

The column 1 rates of duty are most-favored-nation (MFN) rates and are assessed on imports from all countries except those Communist countries and areas listed in general headnote 3(f) of the TSUS. 1/ Imports from these Communist suppliers are assessed the higher column 2 rates. The negotiated rates represent the column 1 rates reduced as a result of concessions granted in the Tokyo round of the Multilateral Trade Negotiations (MTN), conducted under the General Agreement on Tariffs and Trade (GATT) during 1973-79. The duty reductions granted on towels and washcloths will be implemented in 1-year intervals (staging) over a period of 6 years, with the initial reductions effective January 1, 1982. The staged rates applicable to towels and washcloths are provided in appendix A. For example, the duty on towels classified under TSUS item 366.24, which accounted for 61 percent of the imports under consideration in 1980, will be reduced from 14 percent to 10.5 percent ad valorem by 1987.

Towels and washcloths are not eligible for preferential treatment under the Generalized System of Preferences (GSP); 2/ however, certain towels and washcloths are so eligible under the LDDC rate of duty effective on January 1, 1982. 3/

1/ The only Communist countries currently eligible for MFN treatment are Hungary, the People's Republic of China, Poland, Romania, and Yugoslavia.

2/ GSP provides for duty-free treatment of eligible articles imported directly from designated beneficiary developing countries to encourage their economic growth. Provided under title V of the Trade Act of 1974, GSP applies to merchandise imported on or after Jan. 1, 1976, and is scheduled to expire on Jan. 4, 1985.

3/ The LDDC rate reflects the final U.S. MTN concession rate for an item without the normal staging of duty reductions, and is applicable to products from the least developed developing countries which are not granted duty-free treatment under the GSP. The LDDC's supply less than 1 percent of the imports, based on 1980 trade.

Towels and washcloths: U.S. rates of duty, present and negotiated, by TSUS items

TSUS item No.	Description	Present col. 1 rate of duty 1/	Negotiated col. 1 rate of duty 2/	Col. 2 rate of duty
	Ornamented towels and washcloths:			
365.78	Of cotton	27.5% ad val.	12.8% ad val.	90% ad val.
365.83	Of vegetable fibers, except cotton	18.8% ad val.	12.8% ad val. 3/	90% ad val.
	Not ornamented towels:			
	Of cotton:			
	Pile or tufted construction:			
366.18	Valued not over 45 cents each	13.4% ad val.	10.5% ad val.	40% ad val.
	Valued over 45 cents each:			
366.21	Valued not over $1.45 per pound.	13.9¢ per pound	13.5¢ per pound	40% ad val.
366.24	Valued over $1.45 per pound	13.4% ad val.	10.5% ad val.	40% ad val.
366.27	Other	14.3% ad val.	10.5% ad val.	40% ad val.
	Of vegetable fibers except cotton:			
	Woven, except pile or tufted construction:			
366.30	With not over 100 yarns per square inch, counting warp and filling.	18% ad val.	8% ad val. 3/	55% ad val.
366.33	With over 100 yarns but not over 120 yarns per square inch, counting warp and filling.	12.6% ad val.	8% ad val. 3/	55% ad val.
366.36	With over 120 yarns per square inch, counting warp and filling.	3.9% ad val.	3.1% ad val. 3/	40% ad val.
366.39	Other	6.2% ad val.	4.4% ad val. 3/	40% ad val.
	Not ornamented washcloths:			
	Pile or tufted construction:			
	Of cotton:			
366.60	Velveteen, velvet, plush, velour, or any combination thereof.	27% ad val.	12% ad val.	62.5% ad val.
366.65	Terry	13.7% ad val.	7.2% ad val.	40% ad val.

1/ Effective Jan. 1, 1982.

2/ Represents the final concession rate negotiated at the Tokyo round of the MTN. It will be achieved through 6 annual staged reductions, with the first reduction implemented on Jan. 1, 1982. The concession rate on TSUS item 365.83 will be implemented over a 7-year period.

3/ Also represents the LDDC rate.

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The tariff classification of and rates of duty on towels are based on the following factors: (1)The presence or absence of ornamentation; (2) the fiber of chief value (e.g., cotton); (3) pile or nonpile construction; (4) the unit value of certain cotton towels; (5) the value per pound of certain cotton towels; and (6) the number of yarns per square inch of certain towels made of vegetable fibers except cotton. Ornamented towels, which contain any nonfunctional feature such as embroidery, fringe, or other embellishments, are usually subject to higher rates of duty than unornamented towels. Most cotton towels are assessed a higher duty than are linen or other vegetable fiber towels.

The United States is a party to the Arrangement Regarding International Trade in Textiles, commonly known as the Multifiber Arrangement (MFA), sanctioned under the GATT. 1/ The MFA provides the legal framework for 51 member countries to negotiate bilateral agreements allowing for the orderly development of international trade in textiles and apparel. The MFA went into effect in January 1974 for 4 years and was extended for 4 more years through 1981. On December 22, 1981, the MFA was extended through July 1986.

Under the MFA, the United States has negotiated agreements with 19 countries 2/ providing for specific limits 3/ on U.S. imports of individual textile and apparel products or groups of products or, in some cases, providing for consultations when predetermined import levels are reached. Similar agreements were negotiated under section 204 of the Agricultural Act of 1956 with Taiwan, the People's Republic of China (China), Costa Rica, and Mauritius, which are not MFA signatories. The United States also has agreements with 10 other countries 4/ providing for consultations should their exports to the United States cause market disruption.

To monitor textile and apparel imports under the U.S. trade agreements program, imports are grouped under three-digit category numbers according to their fiber content (cotton, wool, or manmade fibers), fabric construction (knit or not knit), and product group (yarn, fabric, apparel, or home furnishings). Cotton towels are classified under category 363 (terry and other pile towels) and category 369 (other cotton manufactures (e.g., nonpile towels)).

Among the major suppliers, specific limits have been negotiated with Pakistan for category 363 and with Brazil for categories 363 and 369. A

1/ For a more definitive discussion of the MFA, see U.S. International Trade Commission, The Multifiber Arrangement, 1973 to 1980: Report on Investigation No. 332-108, vol. 1, USITC Publication 1131, March 1981.

2/ As of September 1981, they included Brazil, Colombia, Haiti, Hong Kong, India, Japan, Korea, Macau, Malaysia, Mexico, Pakistan, the Philippines, Poland, Romania, Singapore, Thailand, Yugoslavia, the Dominican Republic, and Sri Lanka.

3/ The limits specify the amount of imports which may enter the United States in a specific category in a designated 12-month period. This limit is subject to change according to the flexibility provisions in the bilateral agreement.

4/ As of September 1981, they were Egypt, Czechoslovakia, Greece, Hungary, Jamaica, Malta, Nicaragua, Peru, Portugal, and Spain.

designated consultation level 1/ was negotiated with Pakistan for category 369 and with India for both categories. For the quota year ending December 31, 1980, Pakistan filled its quota under category 363 and 84 percent of its quota under category 369. The current quota year with Pakistan covers the 18-month period ending June 30, 1982, when the agreement with Pakistan expires. As of November 27, 1981, Pakistan had filled 68 percent of its quota under category 363 and 57 percent under category 369. For the quota year ending March 31, 1981, Brazil filled 23 percent of its quota under category 363 and 17 percent of its quota under category 369. For the quota year ending March 31, 1982, Brazil had filled 25 percent of its quota under category 363 and 8 percent of its quota under category 369 as of September 1981. For the quota year ending December 31, 1980, India filled 29 percent of its quota under category 363 and 32 percent of its quota under category 369. For the quota year ending December 31, 1981, India had used 30 percent of its quota under category 363 and 42 percent of its quota under category 369 as of December 11, 1981.

Towels have been the subject of an investigation conducted by the U.S. International Trade Commission. In July 1980, the Commission found that an industry in the United States was not materially injured, was not threatened with material injury, and the establishment of an industry in the United States was not materially retarded, by reason of subsidized cotton towels imported from Pakistan. 2/

During the past 5 years, one firm producing towels has applied for and received certification for trade adjustment assistance from the U.S. Department of Commerce. Only one trade adjustment assistance investigation has been conducted by the U.S. Department of Labor involving towel production workers since April 3, 1975 (the beginning of the program), but no adjustment assistance was granted.

Foreign customs treatment

With the principal exceptions of the United States and Canada, the Customs Cooperation Council Nomenclature (CCCN), formerly the Brussels Tariff Nomenclature, is used as the basis for most countries' tariff classifications. In the CCCN, towels are classified under heading 62.02 (Other Made Up Textile Articles), which also includes blankets and bed linens. The present rates of duty and the final MTN concession rates applicable to U.S.-made towels in the major export markets--Canada, Japan, and the European Community (EC) 3/-- are shown in the following table.

1/ A designated consultation level (DCL) is a more flexible import control than specific ceilings or limits; DCL's are usually somewhat above existing levels of trade, and once reached cannot be exceeded unless the United States agrees to further shipments. They normally apply to categories in which trade is not as great as in those for which specific limits are set and are determined annually through the consultation procedure with each bilateral country with which they exist.

2/ See Textiles and Textile Products of Cotton From Pakistan: Determination of the Commission in Investigations Nos. 701-TA-62 and 63 (Final). . ., USITC Publication 1086, July 1980.

3/ The EC, a customs union of 10 countries having a common external tariff, comprises Belgium, Denmark, France, Ireland, Italy, Luxembourg, the Netherlands, the United Kingdom, West Germany, and Greece.

Towels and washcloths: Selected rates of duty, present and negotiated, in principal foreign markets for U.S. exports

Market	Description of commodity and foreign tariff item No.	Present rate of duty 1/	Negotiated rate of duty 2/
Canada	Clothing, wearing apparel and other articles, made from woven fabrics wholly of cotton (52305-1).	22.5% ad val.	3/
	Towels and glass-cloths of crash or huck, wholly or in part of flax or hemp (54310-1).	20% ad val.	3/
Japan	Toilet and kitchen linen of flax or ramie (62.02).	12% ad val. 4/	12% ad val.
	Toilet and kitchen linen of cotton (62.02).	11.2% ad val. 4/	11.2% ad val.
EC	Toilet and kitchen linen of cotton, flax or ramie (62.02).	18% ad val.	13% ad val.

1/ Rates applicable in 1981 to imports from the United States.
2/ Final rates negotiated at the Tokyo round of the MTN.
3/ No concession granted.
4/ Temporary rate, which equals the final MTN concession rate.

The U.S. Industry

Basic data

Establishments engaged in producing towels and washcloths are classified primarily in Standard Industrial Classification (SIC) 2211 (cotton weaving mills) and in SIC 2392 (housefurnishings, except curtains and draperies). Establishments classified in SIC 2211 are integrated mills weaving cotton textiles, such as towels and fabrics. Those classified in SIC 2392 are cut-and-sew operations which fabricate housefurnishings, such as towels, from purchased fabrics. 1/ In 1977, approximately 60 percent of total towel shipments were classified in SIC 2211 2/ and virtually all the remainder, in SIC 2392. However, towels represented only about 7 percent of total shipments in SIC 2211 and 25 percent of shipments in SIC 2392.

Domestic production of towels and washcloths is concentrated among five firms, which account for 80 percent of total shipments. The four largest firms, which produce primarily household towels, are fully integrated from the raw material to the finished product. In addition, they produce a wide variety of textile products, including other housefurnishings. The smaller manufacturers generally produce only nonpile towels, both household and institutional.

1/ An establishment that embellishes or otherwise ornaments toweling without cutting or hemming is classified in SIC 2395 (pleating, decorative and novelty stitching, and tucking for the trade).
2/ Also includes an unknown, but believed to be small, amount of towels produced in SIC 2221 (manmade-fiber weaving mills).

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Approximately 24 plants produce towels and washcloths, with 20 classified in SIC 2392 and the remainder, in SIC 2211. According to industry sources, there are nine domestic producers of terry towels. Towel production is concentrated in the Southeast, particularly in North Carolina, Georgia, and South Carolina. Average employment in SIC 2392, where towels represent 25 percent of shipments, increased from 50,900 persons in 1978 to 52,200 in 1980.

Production

Towel production is more capital intensive than labor intensive because it is standardized, involves relatively few manual tasks, and occurs on a large scale. Wages of towel production workers tend to be similar to those of other production workers in the textile industry. In 1980, the hourly wage in the textile industry was $5.07, compared with $7.27 for all manufacturing.

Although towel production methods have not changed significantly over the years, technological innovations have been introduced to improve weaving efficiency and product quality, reduce labor input, and increase design capabilities. In addition to using polyester to increase the strength and durability of pile towels, manufacturers use looms which make selvages on the sides, eliminating the cutting and hemming process. They also use Jacquard looms, which have a series of perforated patterned cards to regulate the feeding of different colors of yarns, to create sculptured effects or intricate patterns in towels. On looms with a dobby attachment (the mechanical part which controls the harnesses), small geometric figures can be woven directly into the towel. This loom attachment is also used to make small decorative textured borders or wider hems, giving an embellished look to the towel.

Financial information

Financial information on towel operations is not available, since the major producers are large integrated textile firms producing a wide range of textile products. However, financial information was compiled by the U.S. International Trade Commission in 1980 in its investigations Nos. 701-TA-62 and 63 (Final) 1/ on subsidized shipments of cotton products from Pakistan. Usable profit-and-loss data were received from six producers representing 18 percent of total U.S. towel production in 1979. Their net sales of towels rose 30 percent from $291 million in 1977 to $378 million in 1979, owing to an increase in the sales volume as well as in the average selling price. Aggregate net operating profit rose by 73 percent from $26 million in 1977 to $45 million in 1979. The ratio of net operating profit to net sales followed a similar trend, increasing from 9.0 to 11.9 percent over the period.

Marketing

The channels of distribution for towels and washcloths differ according to whether the items are marketed for household or institutional use. Most household towels and washcloths are sold directly to retailers; the remainder

1/ See USITC Publication 1086.

go to wholesalers for resale to smaller retailers. Most institutional towels and washcloths are sold to institutional dealers or wholesalers, which in turn sell to end users such as hotels and linen supply firms. The larger linen rental services buy towels and washcloths directly from the manufacturers. Towels and washcloths are also sold through manufacturers' mill outlet stores, which sell directly to the public at prices considerably lower than those in regular retail establishments. The mill outlet stores sell first-quality products, irregulars, and discontinued styles.

U.S. towel producers manufacture towels for sale under their own labels, as well as under the private labels of retail stores, usually national chain stores. In 1980, towels bearing manufacturers' brand names accounted for 51 percent of U.S. producers' shipments; private labels of retail chains, 14 percent; and other, 1/ 35 percent. In terms of quantity, all-white towels accounted for 31 percent of producers' shipments; other solid-color towels, 40 percent; embellished towels, 10 percent; and other "fancies" (includes Jacquards, mixed colors or patterned weaves, prints, and embroidered), 19 percent. The large integrated textile firms producing towels have showrooms in New York City and regional sales offices throughout the country, giving retail buyers access to the latest product lines. These large firms often participate in cooperative advertising and promotional programs, including appearances by nationally known designers and in-store decorating seminars. Some firms also provide special store fixtures for displaying their towels.

Most towel manufacturers publish wholesale price lists twice a year, in November and May, when new product lines are introduced. Price lists usually remain unchanged during the season; they change only to reflect a special offer or an introductory offer on a new product. Towels are usually sold by the dozen, with some producers requiring a minimum order size or dollar value. Normal trade terms granted to retailers are a 2-percent discount if paid within 60 days and generally net 61 days, with no discount. Freight terms are generally f.o.b. the mill.

The U.S. Market

Domestic market profile

The towel and washcloth market comprises two distinct segments: household and institutional. The segments differ significantly in the types and quality of towels and washcloths sold and the factors that influence demand for these items.

Consumer demand in the household market is influenced by fashion, price, and quality. Because fashion is important, new product lines featuring the latest colors and patterns are usually introduced by the large domestic producers twice a year. The white sales of retailers also generate interest in new products, as well as sell the past season's merchandise at reduced prices. White sales generate an estimated one-fourth of annual towel sales at

1/ Includes exports, all Federal and State contract business, commercial accounts (e.g., hotels) which are sold on a contract basis, and institutional dealers which are involved in resale to the institutional trade.

retail; overall, two-thirds of annual sales are made at reduced retail prices. Thus, price is important as consumers seek value in terms of quality. Most household towels and washcloths produced domestically are priced competitively, largely because the same fibers and manufacturing processes are used by most producers. Industry sources indicated that the most popular household towels are those sold at retail in the medium to high-price ranges under well-known brand names. Towels sold under brand names of the large integrated textile producers account for about two-thirds of total retail sales of household towels.

Department and discount stores each account for about a third of household towel sales; national chain stores, 23 percent; and specialty stores, 15 percent. Department stores account for half the retail sales of embellished towels. The retail markup on household towels varies according to the type of outlet. The average markup--based on the retail price--of department stores is 53 percent; discount stores, 45 percent; national chain stores, 50 percent; and specialty stores, 60 percent.

Demand for towel and washcloths by the institutional trade is influenced by price because of the commodity nature of the institutional items and the large quantities involved. The wide variety of colors and patterns found in household towels and washcloths are seldom found in institutional towels and washcloths, most of which are made in solid colors, especially white. In addition, few services are provided to the trade by the towel producers.

Because of the high incidence of theft, towels used by the institutional trade, such as hotels, linen rental services, and beauty shops, are usually of lower price and quality than most household towels. Moreover, demand for institutional towels is more affected by competing products than that for household towels. The use of paper towels and blow dryers in public restrooms has caused demand for huck and crash toweling to decline in recent years.

Because institutional towels constitute the bulk of the imports, price is the major competitive factor between domestic and imported towels. Owing to the better quality, domestic institutional towels are more expensive than most imports. In addition, abundant supplies of cotton and low wage rates contribute to the price advantage of foreign producers. Pakistan, the major source of imported towels, is among the world's largest producers of cotton. In the crop year beginning August 1, 1980, the price quotations on the Liverpool market for two comparable types of Pakistani and U.S. cotton were 84.4 cents a pound and 89.1 cents a pound, respectively. 1/ Although the production of most cotton towels is not labor intensive, the wage rates of production workers in Pakistan are considerably lower than those in the United States.

U.S. consumption

Apparent U.S. consumption of towels and washcloths averaged 144 million dozen in 1976 and 1977, declined to an average of 111.2 million dozen in 1978

1/ The price of Pakistani cotton is for 289 F/AC-134 Punjab SG; the U.S. price is for Orleans/Texas Middling 1-inch.

and 1979 and decreased further to 102 million dozen in 1980 (table 1 of app. C). The value of consumption increased in each year during the period, rising from $619 million in 1976 to $947 million in 1980. The share of the market supplied by imports increased from 4.9 percent in 1976 and 1977 to 8.7 percent in 1980.

Import penetration occurred primarily in the institutional terry towel market. According to statistics of the American Textile Manufacturers Institute, Inc., the ratio of imports to consumption for institutional terry towels and washcloths increased from about 30 percent in 1978 to 34 percent in 1980. The upward trend continued in the first quarter of 1981, when the ratio increased to 42 percent.

In the household towel market, U.S. producers supply all but a small part of the towels consumed domestically. Their fashion leadership and competitive prices make them the dominant factor in the marketplace.

U.S. production

U.S. producers' shipments of towels and washcloths averaged 138 million dozen in 1976 and 1977, declined to 104 million dozen in 1978 and 1979 and decreased further to 94 million in 1980 (table 1). However, because most of the decline came in low-valued huck and crash towels, the value of shipments increased steadily during the period, from $612 million to $937 million. These towels accounted for 93 percent of the decline in the number of towels and washcloths sold between 1977 and 1980. Huck and crash towels used by the institutional trade are partly being displaced by paper towels and blow dryers.

Official statistics of the U.S. Department of Commerce on U.S. producers' shipments, by types, in the years 1976-80 are shown in the following tabulation (in millions of dozens):

Type	1976	1977	1978	1979	1980
Terry towels	45.6	45.1	45.0	47.1	44.0
Huck and crash towels	60.5	70.4	33.5	32.5	28.0
Terry washcloths	30.1	24.7	26.3	24.2	22.4
Total	136.2	140.2	104.8	103.8	94.4

Although terry towels accounted for less than half the total number of towels shipped during 1976-80, they accounted for most of the total value of producers' shipments. The value of terry towel shipments increased from $463 million, or 76 percent of total shipments, in 1976 to $806 million, or 94 percent of the total, in 1980.

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U.S. imports

Imports of towels and washcloths (except shop towels) increased 36 percent, from 6.9 million dozen (valued at $30.4 million) in 1976 to 8.8 million dozen ($60 million) in 1980 (table 1). Imports from Pakistan, the major foreign supplier, more than doubled in 1976-80, increasing from 2.0 million dozen ($4.4 million) to 4.0 million dozen ($14.3 million) (table 2). Pakistan's share of total imports rose from 29 percent in 1976 and 1977 to 46 percent in 1980. India, the second largest supplier, supplied 17 percent of the imports in 1980, compared with 27 percent in 1979 and 23 percent in 1976.

Approximately 70 percent of the total quantity and 88 percent of the total value of imports in 1980 consisted of towels for the institutional trade (table 3); the remainder were for the household market (table 4). Most of the imported institutional items consisted of pile towels (table 5), and most of the household items consisted of nonpile kitchen or dish towels (table 6).

Imports of institutional towels rose from 4.2 million dozen in 1976 to 6.4 million dozen in 1979, and then fell to 6.1 million dozen in 1980 (table 3). Pakistan emerged as the major supplier in 1979, when its shipments increased 66 percent from those in 1978. Pakistan's shipments rose another 11 percent in 1980, when it supplied 45 percent of the imports. Nearly half these imports from Pakistan consisted of low-valued bar mops. By contrast, imports from India, the principal supplier in 1976-78, dropped 44 percent in 1980. The Pakistani towels, including the bar mops, in 1980 were priced at $4.25 a dozen and those from India, at $5.12 a dozen. Imports from all other sources, which include only negligible quantities of bar mops, were valued at $15.60 a dozen.

Terry bath and hand towels classified under items 366.2460 and 366.2480 of the Tariff Schedules of the United States Annotated (TSUSA) and terry bar mops classified under TSUSA item 366.1855 accounted for 68 percent of the total quantity and 85 percent of the total value of institutional towel imports in 1980. Imports of terry bath and hand towels rose from 2.1 million dozen ($12 million) in 1976 to 2.5 million dozen ($40 million) in 1980. Hong Kong and Brazil supplied about 50 percent of these towels in 1976-78, but their share declined to 16 percent in 1979 and 1980. The relative decline of imports from Hong Kong and Brazil reflected smaller shipments and increased imports from Pakistan, whose shipments increased from 5,000 dozen in 1976 to 76,000 dozen in 1978 and to 677,000 dozen in 1980. The Pakistani towels, which accounted for 27 percent of the imports, were valued at $8 a dozen, compared with $19 for those from all other suppliers.

Imports of terry bar mops increased from 1.3 million dozen in 1977 to a high of 2.7 million dozen in 1979 before decreasing to 1.7 million in 1980. Pakistan was by far the leading supplier, with about three-fourths of the imports in 1980. India supplied an additional 19 percent of the imports. Bar mops imported in 1980 were valued at $2.39 a dozen.

Imports of household towels and washcloths averaged 2.4 million dozen in 1976-78, and then increased to 3.1 million in 1979 before decreasing to 2.7 million in 1980 (table 4). Half the imports in 1980 consisted of cotton

dish towels classified under TSUSA item 366.2760; more than two-thirds of these towels came from Pakistan and India. Another 20 percent of the imports comprised kitchen towels made of linen or a blend of cotton and linen (TSUS items 366.30- 366.36). These linen towels, also called tea towels, are better than cotton towels for drying dishes or glasses because the coarse yarns help prevent linting. More than half these linen towels were imported from the United Kingdom. Imports of terry towels for household use during 1976-80 were small, consisting of expensive embellished terry towels and terry bath sheets (oversized bath towels) from Brazil.

Imports of shop towels (TSUSA item 366.2740) increased from 5.2 million dozen in 1976 to 8.2 million dozen in 1978 before declining to 7.6 million in 1980 (table 7). The imports in 1980 were valued at $7.4 million. Hong Kong and Singapore were the largest foreign suppliers in 1976-79; in 1980, China was the largest, with 42 percent of the total. Shop towels imported from Hong Kong and Singapore during 1976-80 were valued at $1.01 a dozen, compared with 74 cents for those from China.

There are approximately 500 importers of towels and washcloths in the United States, most of which are located in New York, Los Angeles, Chicago, and Dallas. Some of the importing firms are large-volume institutional dealers, which sell to linen supply firms and other institutional users. The large domestic producers of towels are not importers of towels.

The International Market

International market profile

The largest markets for towels are the developed countries, such as the United States, Canada, and the EC nations. Demand for towels in these countries is generally met by the home producers. However, these countries import low-cost towels, used primarily by the institutional trade, from the developing countries of Asia.

U.S. exports

Although the value of U.S. exports of towels and washcloths more than doubled from $23.3 million in 1976 to $49.7 million in 1980 (table 1), the quantity showed little growth, averaging 1.5 million dozen annually. This represented less than 2 percent of U.S. producers' annual shipments.

Terry towels are bulky and therefore expensive to ship, offsetting any price advantage of U.S. producers in world markets. In addition, the major markets for U.S. exports, the EC and Canada (table 8), are supplied primarily by producers in the home market. A U.S. producer of towels recently opened a facility in Ireland to better serve its EC market.

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Appendix A

Part 5, Subpart C, Schedule 3, of the Tariff Schedules of the United States Annotated (1982) and Staged Rates of Duty

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GSP	Item	Stat. Suffix	Articles	Units of Quantity	Rates of Duty 1	Rates of Duty LDDC	Rates of Duty 2
			Other bedding, not ornamented (con.):				
			Of vegetable fibers (con.):				
	363.60		Other	.....	14.4% ad val.		40% ad val.
		15	Quilt covers (362)	No. v Lb.			
		30	Other (369)	No. v Lb.			
			Of wool:				
	363.65		Blankets:				
			Not over 3 yards in length	.....	25c per lb. + 15% ad val.		40c per lb. + 40% ad val.
		20	Baby carriage robes, lap robes, and steamer rugs (464)	No. v Lb.			
		40	Other (464)	No. v Lb.			
	363.70	00	Over 3 yards in length (410)	No. v Lb. 1/	32c per lb. + 12.5% ad val.		50c per lb. + 60% ad val.
	363.75	00	Other (469)	Lb.	15.3% ad val.		50% ad val.
	363.80	00	Of silk	Lb.	12.2% ad val.	5.4% ad val.	65% ad val.
	363.85		Of man-made fibers	.....	10c per lb. + 14.7% ad val.		77.5% ad val.
		12	Blankets (666)	No. v Lb.			
		15	Sheets (666)	No. v Lb.			
		25	Pillowcases (666)	No. v Lb.			
		45	Bedspreads (666)	No. v Lb.			
		50	Coverlets, quilts, and comforters (666)	No. v Lb.			
		55	Other (666)	No. v Lb.			
	363.90	00	Other	Lb.	8% ad val.	5.3% ad val.	40% ad val.

Subpart C. - Tapestries, Linens, and Other Furnishings

Subpart C headnote:

1. For the purposes of this subpart, the term "furnishings" means curtains and drapes, including panels and valances; towels, napkins, tablecloths, mats, scarves, runners, doilies, centerpieces, antimacassars, and furniture slipcovers; and like furnishings; all the foregoing, of textile materials, and not specially provided for.

1/ The unit of measure to be used by Customs field offices when reporting imports of textiles under item 363.7000 to Customs Headquarters Quota Section shall be "sq. yd." (see schedule 3 statistical headnote 4).

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GSP	Item	Stat. Suffix	Articles	Units of Quantity	Rates of Duty 1	LDDC	2
			Tapestries, including hand-worked petit-point and other needle-point tapestries, all the foregoing of textile materials:				
	364.05	00	Gobelin and other hand-woven tapestries fit only for use as wall hangings, and valued over $20 per square foot	Sq. yd..	Free		Free
			Other:				
			Of vegetable fibers:				
			Jacquard-figured:				
			Not pile construction:				
	364.07	00	Of cotton.....(320)	Sq. yd..	13.7% ad val.		55% ad val.
A	364.09	00	Of vegetable fibers, except cotton	Sq. yd..	13.7% ad val.	7.2% ad val.	55% ad val.
			Pile construction:				
	364.13	00	Of cotton.....(369)	Sq. yd.v Lb.	13.7% ad val.		40% ad val.
A	364.14	00	Of vegetable fibers, except cotton	Sq. yd..	13.7% ad val.	7.2% ad val.	40% ad val.
			Other:				
	364.16	00	Certified hand-loomed and folklore products and articles of cotton.....(369)	Sq. yd..	12% ad val.		40% ad val.
A	364.18	00	Other	Sq. yd..	12% ad val.	7.2% ad val.	40% ad val.
			Of wool:				
	364.20	00	Valued not over $2 per pound.....(411)	Sq. yd.v Lb.	32c per lb. + 9% ad val.		50c per lb. + 50% ad val.
			Valued over $2 per pound:				
A	364.21	00	Certified hand-loomed and folklore products	Sq. yd.v Lb.	31c per lb. + 6.4% ad val.		64.5% ad val.
	364.23	00	Other.....(411)	Sq. yd.v Lb.	31c per lb. + 6.4% ad val.		64.5% ad val.
A	364.25	00	Of silk	Sq. yd..	12.4% ad val.	6.9% ad val.	65% ad val.
	364.30	00	Of man-made fibers.....(666)	Sq. yd.v Lb.	10c per lb. + 13.8% ad val.		74% ad val.
A	364.35	00	Other	Sq. yd..	8% ad val.	5.3% ad val.	40% ad val.
			Lace or net furnishings, whether or not ornamented, and other furnishings, ornamented:				
			Handmade-lace furnishings:				
			Valued not over $50 per pound:				
	365.00	00	Of cotton.....(369)	Lb.....	32% ad val.		90% ad val.
A	365.05	00	Of vegetable fibers, except cotton.....	Lb.....	14.8% ad val.	14% ad val.	90% ad val.
			Other:				
	365.11		Of wool or of man-made fibers.....	.....	19% ad val.		90% ad val.
		10	Of wool.....(469)	Lb.			
		20	Of man-made fibers.....(666)	Lb.			
A	365.14		Other.....	.....	19% ad val.	14% ad val.	90% ad val.
		10	Of silk.....	Lb.			
		20	Other.....	Lb.			
A	365.15	00	Valued over $50 per pound.....	Lb.....	8.9% ad val.	5.7% ad val.	90% ad val.
			Machine-made-lace furnishings:				
			Made on a Leavers (including go-through) machine:				
			12 points or finer:				
	365.20	00	Of man-made fibers.....(666)	Lb.....	17.7% ad val.		90% ad val.
A	365.25	00	Other	Lb.....	20.2% ad val.	16% ad val.	90% ad val.
			Not 12 points or finer:				
A	365.29	00	Of vegetable fibers (except cotton), or of wool	Lb.....	21.4% ad val.	16% ad val.	90% ad val.
	365.31		Other.....	.....	37% ad val.		90% ad val.
		60	Of man-made fibers.....(666)	Lb.			
		95	Other.....	Lb.			

Note: For explanation of the symbol "A" or "A*" in the column entitled "GSP", see general headnote 3(c).

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GSP	Item	Stat. Suffix	Articles	Units of Quantity	Rates of Duty 1	Rates of Duty LDDC	Rates of Duty 2
			Lace or net furnishings, etc. (con.):				
			Machine-made-lace furnishings (con.):				
	365.35		Made on a bobbinet-jacquard machine	.....	19.3% ad val.		90% ad val.
		60	Of man-made fibers (666)	Lb.			
		95	Other	Lb.			
	365.40		Made on a Nottingham lace-curtain machine:				
		10	Of vegetable fibers	.....	23.5% ad val.		60% ad val.
		30	Of cotton (369)	Lb.			
	365.45		Of vegetable fibers, except cotton	Lb.			
		60	Other	.....	23.5% ad val.		90% ad val.
		95	Of man-made fibers (666)	Lb.			
	365.50		Other	Lb.			
		10	Made on any other machine	.....	37% ad val.		90% ad val.
		60	Of cotton (369)	Lb.			
		95	Of man-made fibers (666)	Lb.			
			Other	Lb.			
	365.68	00	Burnt-out-lace furnishings:				
A	365.72	00	Subject to textile agreements (666)	Lb.	20.8% ad val.		90% ad val.
			Other	Lb.	20.8% ad val.		90% ad val.
			Of lace, of netting, or of lace and netting, and made in designs or patterns formed wholly or in substantial part by joining (by applique or otherwise) machine-made, or handmade and machine-made, materials by handwork:				
	365.74		Subject to textile agreements	.....	29.3% ad val.		90% ad val.
		10	Of cotton (369)	Lb.			
		60	Of man-made fibers (666)	Lb.			
		95	Other	Lb.			
A	365.76	00	Other	Lb.	29.3% ad val.		90% ad val.
			Net furnishings made on a lace, net, or knitting machine, whether or not ornamented; and other furnishings, ornamented:				
	365.77	00	Of cotton:				
			Curtains and drapes, including panels and valances, all the foregoing if machine-embroidered but not otherwise ornamented (369)	Lb.	18.8% ad val.		90% ad val.
	365.78		Other	.....	27.5% ad val.		90% ad val.
		15	Dish towels (369)	No. v / Lb.			
		17	Other towels and wash cloths (369)	No. v / Lb.			
		25	Wall hangings (369)	No. v / Lb.			
		55	Curtains and drapes (369)	No. v / Lb.			
		65	Other (369)	No. v / Lb.			
	365.80	00	Of vegetable fibers, except cotton:				
*	365.81	00	Damask tablecloths and damask napkins	Lb.	14.6% ad val.	12.8% ad val.	90% ad val.
*	365.83	00	Curtains and drapes	Lb.	18.8% ad val.	12.8% ad val.	90% ad val.
A	365.84	00	Towels and washcloths	Lb.	18.8% ad val.	12.8% ad val.	90% ad val.
			Other	Lb.	18.8% ad val.	12.8% ad val.	90% ad val.

Note: For explanation of the symbol "A" or "A*" in the column entitled "GSP", see general headnote 3(c).

BEST DOCUMENT AVAILABLE

GSP	Item	Stat. Suffix	Articles	Units of Quantity	Rates of Duty 1	LDDC	2
			Lace or net furnishings, etc. (con.):				
			Net furnishings made on a lace, net, or knitting machine, etc. (con.):				
			Other:				
	365.86		Of wool or of man-made fibers.....	.....	19.6% ad val.		90% ad val.
			Of wool:				
		10	Wall hangings.....(469)	Lb.			
		20	Other.....(469)	Lb.			
			Of man-made fibers:				
		40	Wall hangings.....(666)	Lb.			
		60	Curtains and drapes.....(666)	Lb.			
		70	Tablecloths and napkins...(666)	Lb.			
		80	Other.....(666)	Lb.			
A	365.9[illegible]		Other.....	.....	19.6% ad val.	12.8% ad val.	90% ad val.
		10	Of silk.....	Lb.			
		20	Other.....	Lb.			
			Other furnishings, not ornamented:				
			Of vegetable fibers:				
			Curtains and drapes, including panels and valances:				
			Pile or tufted construction:				
			Of cotton:				
	366.03	00	Velveteen, velvet, plush, velour, or any combination thereof.....(369)	No.....v Lb.	27.5% ad val.		62.5% ad val.
	366.06	00	Corduroy.....(369)	No.....v Lb.	35.1% ad val.		50% ad val.
	366.09	00	Other.....(369)	No.....v Lb.	18.3% ad val.		50% ad val.
	366.12	00	Of vegetable fibers, except cotton.....	No.....v Lb.	5.4% ad val.	2.4% ad val.	50% ad val.
	365.15		Other.....	.....	13.7% ad val.		40% ad val.
		20	Of cotton.....(369)	No. v Lb.			
		40	Of vegetable fibers, except cotton.....	No. v Lb.			
			Towels:				
			Of cotton:				
			Pile or tufted construction:				
	366.18		Valued not over 45 cents each.....	.....	13.4% ad val.		40% ad val.
			Dish towels:				
		20	Terry.....(369)	No. v Lb.			
		40	Other.....(369)	No. v Lb.			
			Other:				
			Terry:				
		55	Bar mops (measuring 18 to 20 inches in length and 15 to 17 inches in width)..(369)	No. v Lb.			
		65	Other.....(363)	No. v Lb.			
		80	Other.....(363)	No. v Lb.			

Note: For explanation of the symbol "A" or "A*" in the column entitled "GSP", see general headnote 3(c).

BEST DOCUMENT AVAILABLE

C S P	Item	Stat. Suf-fix	Articles	Units of Quantity	Rates of Duty 1	LDDC	2
			Other furnishings, not ornamented (con.):				
			Of vegetable fibers (con.):				
			Towels (con.):				
			Of cotton (con.):				
			Pile or tufted construction (con.):				
	366.21		Valued over 45 cents each:				
			Valued not over $1.43 per pound	.....	13.9¢ per lb.		40% ad val.
		20	Dish towels:				
			Terry.....(369)	No. v Lb.			
		40	Other.....(369)	No. v Lb.			
			Other:				
		60	Terry.....(363)	No. v Lb.			
		80	Other.....(363)	No. v Lb.			
	366.24		Valued over $1.43 per pound	.....	13.4% ad val.		40% ad val.
		20	Dish towels:				
			Terry.....(369)	No. v Lb.			
		40	Other.....(369)	No. v Lb.			
			Other:				
		60	Terry.....(363)	No. v Lb.			
		80	Other.....(363)	No. v Lb.			
	366.27		Other	.....	14.3% ad val.		40% ad val.
		20	Jacquard-figured.....(363)	No. v Lb.			
		40	Not jacquard-figured: Shop towels (dedicated to use in garages, filling stations, and machine shops).....(369)	No. v Lb.			
		60	Dish towels.....(369)	No. v Lb.			
		80	Other.....(369)	No. v Lb.			
			Of vegetable fibers, except cotton:				
	366.30	00	Woven, except pile or tufted construction: With not over 100 yarns per square inch, counting warp and filling	No.....v Lb.	18% ad val.	8% ad val.	55% ad val.
	366.33	00	With over 100 yarns but not over 120 yarns per square inch, counting warp and filling	No.....v Lb.	12.6% ad val.	8% ad val.	55% ad val.
	366.36	00	With over 120 yarns per square inch, counting warp and filling	No.....v Lb.	3.9% ad val.	3.1% ad val.	40% ad val.
	366.39	00	Other	No.....v Lb.	6.2% ad val.	4.4% ad val.	40% ad val.

BEST DOCUMENT AVAILABLE

GSP	Item	Stat. Suffix	Articles	Units of Quantity	Rates of Duty 1	Rates of Duty LDDC	Rates of Duty 2
			Other furnishings, not ornamented (con.):				
			Of vegetable fibers (con.):				
			Tablecloths and napkins:				
			Of cotton:				
	366.42	00	Damask.....(369)	Lb.....	12.4% ad val.		30% ad val.
			Other:				
	366.45	00	Block-printed by hand.....(369)	Lb.....	17% ad val.		30% ad val.
			Not block-printed by hand:				
	366.46	00	Plain-woven, wholly of cotton.....(369)	Lb.....	6% ad val.		30% ad val.
	366.47	00	Other.....(369)	Lb.....	11.5% ad val.		40% ad val.
			Of vegetable fibers, except cotton:				
	366.48		Damask.....	.....	4.8% ad val.	3.7% ad val.	55% ad val.
		20	Tablecloths.....	Lb.			
		40	Napkins.....	Lb.			
			Other:				
	366.51	00	Tablecloths.....	Lb.....	6.2% ad val.	4.4% ad val.	40% ad val.
	366.54	00	Napkins.....	Lb.....	4.8% ad val.	3.7% ad val.	55% ad val.
			Other:				
	366.57		Knit (except pile or tufted construction).....	.....	17.1% ad val.		45% ad val.
		20	Of cotton.....(369)	Lb.			
		40	Of vegetable fibers, except cotton.....	Lb.			
			Pile or tufted construction:				
			Of cotton:				
	366.60	00	Velveteen, velvet, plush, velour, or any combination thereof.....(369)	Lb.....	27% ad val.		62.5% ad val.
	366.63	00	Corduroy.....(369)	Lb.....	35.2% ad val.		50% ad val.
	366.65	00	Terry.....(369)	Lb.....	13.7% ad val.		40% ad val.
	366.69	00	Other.....(369)	Lb.....	13.7% ad val.		40% ad val.
	366.72	00	Of vegetable fibers, except cotton.....	Lb.....	5.7% ad val.	4.2% ad val.	50% ad val.
			Other:				
			Of cotton:				
	366.75	00	Damask.....(369)	Lb.....	13.7% ad val.		30% ad val.
			Other:				
	366.77	00	Plain-woven, wholly of cotton.....(369)	Lb.....	13.7% ad val.		30% ad val.
	366.79		Other.....	.....	13.7% ad val.		40% ad val.
		25	Wall hangings...(369)	Lb.			
		30	Other.....(369)	Lb.			
			Of vegetable fibers, except cotton:				
	366.81	00	Damask.....	Lb.....	4.8% ad val.	3.7% ad val.	45% ad val.
A	366.84	00	Other.....	Lb.....	3.5% ad val.	2.5% ad val.	40% ad val.
			Of wool:				
			Knit (except pile or tufted construction):				
	367.05	00	Valued not over $5 per pound.....(469)	Lb.....	31c per lb. + 14% ad val.		60% ad val.
	367.10	00	Valued over $5 per pound.....(469)	Lb.....	31c per lb. + 9.8% ad val.		52.5% ad val.
	367.15	00	Pile or tufted construction.....(469)	Lb.....	27c per lb. + 9.7% ad val.		65.5% ad val.

Note: For explanation of the symbol "A" or "A*" in the column entitled "GSP", see general headnote 3(c).

BEST DOCUMENT AVAILABLE

GSP	Item	Stat. Suffix	Articles	Units of Quantity	Rates of Duty 1	Rates of Duty LDDC	Rates of Duty 2
			Other furnishings, not ornamented (con.):				
			Of wool (con.):				
			Nonwoven felt:				
	367.20	00	Valued not over $1.50 per pound ....(469)	Lb.....	19¢ per lb. + 10% ad val.		30¢ per lb. + 35% ad val.
	367.25	00	Valued over $1.50 per pound.....(469)	Lb.....	25¢ per lb. + 9.6% ad val.		48.5% ad val.
			Other:				
			Certified hand-loomed and folklore products:				
A	367.28	00	Pillow covers.....	Lb.....	13% ad val.		50% ad val.
A	367.31	00	Wall hangings.....	Lb.....	13% ad val.		50% ad val.
	367.34		Other.....	.....	13% ad val.		50% ad val.
		24	Wall hangings.....(469)	Lb.			
		28	Other.....(469)	Lb.			
			Of silk:				
	367.35	00	Knit (except pile or tufted construction).....	Lb.....	9.3% ad val.	5.8% ad val.	60% ad val.
	367.40	00	Pile or tufted construction.....	Lb.....	8% ad val.	5.3% ad val.	70% ad val.
	367.45	00	Other.....	Lb.....	10.5% ad val.	5.4% ad val.	65% ad val.
			Of man-made fibers:				
	367.50	00	Knit (except pile or tufted construction).....(666)	Lb.....	10¢ per lb. + 14.7% ad val.		74.5% ad val.
	367.55	00	Pile or tufted construction.....(666)	Lb.....	5¢ per lb. + 11.6% ad val.		78% ad val.
			Other:				
	367.59	00	Of glass.....(666)	Lb.....	11% ad val.		60% ad val.
	367.60		Other.....	.....	20¢ per lb. + 15.6% ad val.		72.5% ad val.
		25	Wall hangings.....(666)	Lb.			
		35	Curtains and drapes.....(666)	Lb.			
		40	Tablecloths and napkins.....(666)	Lb.			
		80	Other.....(666)	Lb.			
	367.65	00	Other.....	Lb.....	7.7% ad val.	3.4% ad val.	40% ad val.

Note: For explanation of the symbol "A" or "A*" in the column entitled "GSP", see general headnote 3(c).

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Towels and washcloths: Pre-MTN rates and staged rate modifications, by TSUS items, 1982-87

TSUS item No.	Pre-MTN col. 1 rate of duty 1/	Rates of duty 2/ effective with respect to articles entered on or after Jan. 1--					
		1982	1983	1984	1985	1986	1987
365.78	30%	27.5%	25.1%	22.6%	20.2%	17.7%	15.3% 3/
365.83	20%	18.8%	17.6%	16.4%	15.2%	14%	12.8%
366.18	14%	13.4%	12.8%	12.3%	11.7%	11.1%	10.5%
366.21	14¢/lb	13.9¢/lb	13.8¢/lb	13.7¢/lb	13.7¢/lb	13.6¢/lb	13.5¢/lb
366.24	14%	13.4%	12.8%	12.3%	11.7%	11.1%	10.5%
366.27	15%	14.3%	13.5%	12.8%	12%	11.3%	10.5%
366.30	20%	18%	16%	14%	12%	10%	8%
366.33	13.5%	12.6%	11.7%	10.8%	9.8%	8.9%	8%
366.36	4%	3.9%	3.7%	3.6%	3.4%	3.3%	3.1%
366.39	6.5%	6.2%	5.8%	5.5%	5.1%	4.8%	4.4%
366.60	30%	27%	24%	21%	18%	15%	12%
366.65	15%	13.7%	12.4%	11.1%	9.8%	8.5%	7.2%

1/ Rate effective prior to Jan. 1, 1982.

2/ The symbol "%" indicates "percent ad valorem." The symbol "/" indicates "per stated unit of quantity."

3/ The rate of duty effective on or after Jan. 1, 1988, will be 12.8 percent ad valorem.

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Appendix B

Concordance of TSUS Numbers, Schedule B Numbers, SIC Numbers, SITC Numbers, and CCCN Numbers

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Towels and washcloths: TSUS item numbers, Schedule B numbers, SIC numbers, SITC numbers, and CCCN numbers included in this commodity group

TSUS item No.	Schedule B No.	SIC No.	SITC No.	CCCN No.
365.78 (pt.)	366.4020	2211 (pt.) 2392 (pt.)	658.45 (pt.) 658.46 (pt.)	62.02 (pt.)
365.83	366.4040	2392 (pt.)	658.46 (pt.)	62.02 (pt.)
366.18	366.4020	2211 (pt.) 2392 (pt.)	658.45 (pt.) 658.46 (pt.)	62.02 (pt.)
366.21	366.4020	2211 (pt.) 2392 (pt.)	658.45 (pt.) 658.46 (pt.)	62.02 (pt.)
366.24	366.4020	2211 (pt.) 2392 (pt.)	658.45 (pt.) 658.46 (pt.)	62.02 (pt.)
366.27	366.4020	2211 (pt.) 2392 (pt.) 2399 (pt.)	658.45 (pt.) 658.46 (pt.)	62.02 (pt.)
366.30	366.4040	2392 (pt.)	658.46 (pt.)	62.02 (pt.)
366.33	366.4040	2392 (pt.)	658.46 (pt.)	62.02 (pt.)
366.36	366.4040	2392 (pt.)	658.46 (pt.)	62.02 (pt.)
366.39	366.4040	2392 (pt.)	658.46 (pt.)	62.02 (pt.)
366.60 (pt.)	366.4020	2211 (pt.) 2392 (pt.)	658.45 (pt.)	62.02 (pt.)
366.65 (pt.)	366.4020	2211 (pt.) 2392 (pt.)	658.45 (pt.)	62.02 (pt.)

Appendix C

Statistical Tables

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Table 1.--Towels and washcloths: 1/ U.S. producers' shipments, exports of domestic merchandise, imports for consumption, and apparent consumption, 1976-80

(Quantity in thousands of dozens; value in thousands of dollars; unit value per dozen)

Year	Producers' Shipments	Exports	Imports 2/	Apparent consumption	Ratio (percent) of imports to consumption
	Quantity				
1976	136,200	1,525	6,871	141,546	4.9
1977	140,200	1,308	7,166	146,058	4.9
1978	104,800	1,177	7,546	111,169	6.8
1979	103,800	1,716	9,532	111,616	8.5
1980	94,400	1,591	8,794	101,603	8.7
	Value				
1976	611,859	23,251	30,409	619,017	4.9
1977	695,635	21,007	40,312	714,940	5.6
1978	774,617	34,272	46,388	786,733	5.9
1979	867,390	48,146	52,865	872,109	6.1
1980	937,065	49,700	59,584	946,949	6.3
	Unit value				
1976	$4.36	$15.25	$4.43	-	-
1977	4.97	16.06	5.63	-	-
1978	5.54	29.13	6.15	-	-
1979	8.49	28.05	5.55	-	-
1980	10.00	31.24	6.78	-	-

1/ Does not include shop towels.
2/ Does not include ornamented washcloths.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table 2.--Towels: 1/ U.S. imports for consumption, by principal sources, 1976-80

Source	1976	1977	1978	1979	1980
	Quantity (1,000 dozen)				
Pakistn	2,032	2,091	2,414	3,944	4,048
Brazil	332	330	421	334	231
India	1,582	2,124	2,052	2,560	1,501
Hg Kong	1,272	1,210	1,309	1,174	838
China M	144	217	59	306	889
China t	195	122	187	324	508
Salvadr	63	36	187	251	170
Poland	34	54	104	110	164
Kor Rep	552	347	380	131	124
U King	12	14	17	13	22
All other	653	623	417	386	300
Total	6,871	7,166	7,546	9,532	8,794
	Value (1,000 dollars)				
Pakistn	4,424	5,256	6,433	11,811	14,341
Brazil	4,035	7,790	9,862	8,318	7,552
India	5,279	8,085	6,558	9,760	6,833
Hg Kong	6,891	7,936	8,855	6,971	6,107
China M	943	1,399	495	1,045	5,815
China t	1,825	1,373	1,925	3,434	4,567
Salvadr	1,447	1,556	2,920	4,835	4,506
Poland	358	1,178	2,343	2,510	3,907
Kor Rep	2,981	2,574	3,283	1,220	2,534
U King	133	210	307	346	751
All other	2,093	2,955	3,406	2,564	2,673
Total	30,409	40,312	46,388	52,865	59,584
	Unit value (per dozen)				
Pakistn	$2.18	$2.51	$2.67	$2.99	$3.54
Brazil	12.15	23.64	23.43	24.90	32.62
India	3.34	3.8[illegible]	3.20	3.81	4.55
Hg Kong	5.42	6.56	6.77	5.94	7.29
China M	6.53	6.45	8.40	3.41	6.54
China t	9.38	11.21	10.31	10.60	8.99
Salvadr	23.08	43.06	15.58	19.44	26.58
Poland	10.47	21.77	22.63	22.88	23.78
Kor Rep	5.40	7.42	8.63	9.35	20.47
U King	11.56	15.33	18.06	26.42	33.40
All other	3.20	4.74	8.17	6.65	8.92
Average	4.43	5.63	6.15	5.55	6.78

1/ Includes ornamented washcloths, but does not include unornamented washcloths or shop towels.

Source: Compiled from official statistics of the U.S. Department of Commerce.

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Table 3.--Institutional towels: 1/ U.S. imports for consumption, by principal sources, 1976-80

Source	1976	1977	1978	1979	1980
	Quantity (1,000 dozen)				
Pakistn	1,217	1,329	1,498	2,486	2,757
Brazil	179	279	332	266	197
India	1,077	1,784	1,525	2,069	1,160
Hg Kong	773	701	760	542	450
China M	129	194	43	99	560
Salvadr	62	36	173	251	169
China t	185	117	173	288	450
Poland	21	51	102	105	160
Kor Rep	444	273	328	113	113
Colomb	4	0	3	2	31
All other	111	194	211	163	94
Total	4,202	4,958	5,149	6,385	6,142
	Value (1,000 dollars)				
Pakistn	3,163	3,938	4,846	8,917	11,722
Brazil	3,400	7,594	9,419	7,949	7,342
India	4,201	7,223	5,412	8,705	5,932
Hg Kong	5,996	6,723	7,694	5,780	4,936
China M	878	1,305	433	654	4,911
Salvadr	1,436	1,555	2,850	4,880	4,504
China t	1,796	1,323	1,863	3,276	4,396
Poland	229	1,161	2,333	2,476	3,869
Kor Rep	2,632	2,281	3,119	1,162	2,505
Colomb	45	-	89	45	604
All other	725	1,849	2,231	1,701	1,647
Total	24,501	34,952	40,292	45,544	52,369
	Unit value (per dozen)				
Pakistn	$2.60	$2.96	$3.23	$3.59	$4.25
Brazil	18.95	27.25	28.34	29.86	37.27
India	3.90	4.05	3.55	4.21	5.12
Hg Kong	7.75	9.59	10.12	10.66	10.96
China M	6.78	6.73	10.15	6.57	8.76
Salvadr	23.21	43.06	16.47	19.43	26.58
China t	9.73	11.27	10.77	11.38	9.77
Poland	10.74	22.96	22.90	23.57	24.13
Kor Rep	5.93	8.36	9.51	10.29	22.11
Colomb	12.60	-	26.43	26.33	19.64
All other	6.55	9.51	10.57	10.43	17.58
Average	5.83	7.05	7.82	7.13	8.53

1/ Does not include washcloths. Institutional towels are considered by the industry to be classified under the following TSUSA items: 366.1820, - .1855, - .1865, - .1880, - .2120, - .2160, - .2180, - .2420, - .2460, - .2480.

Source: Compiled from official statistics of the U.S. Department of Commerce.

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Table 4.--Household towels: 1/ U.S. imports for consumption, by principal sources, 1976-80

Source	1976	1977	1978	1979	1980
	Quantity (1,000 dozen)				
Pakistn	815	761	916	1,457	1,291
Hg Kong	499	509	548	632	387
China M	15	23	16	207	329
India	506	340	527	491	341
U King	10	13	16	11	12
Brazil	153	51	88	68	34
Belgium	46	20	29	40	28
Czecho	24	23	35	41	41
China t	10	5	14	36	58
Singapr	272	276	61	91	88
All other	320	187	147	74	44
Total	2,669	2,209	2,397	3,147	2,653
	Value (1,000 dollars)				
Pakistn	1,262	1,318	1,587	2,894	2,619
Hg Kong	895	1,213	1,164	1,193	1,171
China M	65	94	73	392	935
India	1,078	862	1,146	1,055	901
U King	115	198	287	268	384
Brazil	636	195	443	370	210
Belgium	302	220	250	320	200
Czecho	86	82	131	177	197
China t	29	50	62	158	171
Singapr	229	298	108	110	111
All other	1,213	829	887	424	429
Total	5,908	5,360	6,140	7,361	7,327
	Unit value (per dozen)				
Pakistn	$1.55	$1.73	$1.73	$1.99	$2.03
Hg Kong	1.79	2.38	2.12	1.89	3.02
China M	4.35	4.09	4.43	1.90	2.84
India	2.13	2.53	2.17	2.15	2.64
U King	11.64	14.90	18.28	23.86	31.29
Brazil	4.16	3.84	5.01	5.44	6.09
Belgium	6.56	10.75	8.63	8.10	7.17
Czecho	3.60	3.53	3.80	4.35	4.77
China t	2.88	9.80	4.52	4.41	2.95
Singapr	0.84	1.08	1.77	1.21	1.27
All other	3.79	4.43	6.04	5.76	9.86
Average	2.21	2.43	2.56	2.34	2.76

1/ Includes ornamented washcloths, but does not include unornamented washcloths.

Source: Compiled from official statistics of the U.S. Department of Commerce.

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Table 5.--Pile towels: 1/ U.S. imports for consumption, by principal sources, 1976-80

Source	1976	1977	1978	1979	1980
	Quantity (1,000 dozen)				
Pakistn	1,231	1,350	1,529	2,523	2,887
Brazil	209	285	332	266	200
India	1,099	1,806	1,574	2,077	1,185
China M	130	208	46	121	600
Hg Kong	853	729	777	608	470
Salvadr	63	36	187	251	169
China t	185	120	179	301	462
Poland	21	51	102	105	160
Kor Rep	453	277	332	113	113
Colomb	23	0	3	2	31
All other	161	211	216	164	95
Total	4,428	5,074	5,278	6,531	6,373
	Value (1,000 dollars)				
Pakistn	3,185	3,970	4,892	8,976	11,949
Brazil	3,502	7,612	9,419	7,949	7,356
India	4,262	7,283	5,514	8,726	5,991
China M	884	1,367	438	691	5,053
Hg Kong	6,200	6,821	7,781	5,967	4,978
Salvadr	1,446	1,555	2,919	4,881	4,504
China t	1,799	1,357	1,879	3,334	4,443
Poland	229	1,161	2,333	2,476	3,869
Kor Rep	2,658	2,300	3,133	1,102	2,505
Colomb	74	-	89	45	604
All other	891	1,925	2,264	1,724	1,678
Total	25,130	35,351	40,662	45,930	52,931
	Unit value (per dozen)				
Pakistn	$2.59	$2.94	$3.20	$3.56	$4.14
Brazil	16.76	26.66	28.34	29.86	36.83
India	3.88	4.03	3.50	4.20	5.05
China M	6.79	6.56	9.56	5.70	8.43
Hg Kong	7.26	9.35	10.02	9.81	10.59
Salvadr	23.08	43.06	15.58	19.43	26.58
China t	9.71	11.28	10.48	11.09	9.62
Poland	10.74	22.96	22.90	23.57	24.13
Kor Rep	5.87	8.31	9.44	10.29	22.11
Colomb	3.17	-	26.43	26.33	19.64
All other	5.54	9.10	10.47	10.50	17.64
Average	5.67	6.97	7.70	7.03	8.31

1/ Does not include unornamented towels, imports of which were less than $500,000 annually.

Source: Compiled from official statistics of the U.S. Department of Commerce.

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Table 6.--Nonpile towels: 1/ U.S. imports for consumption, by principal sources, 1976-80

Source	1976	1977	1978	1979	1980
	Quantity (1,000 dozen)				
Pakistn	801	741	885	1,420	1,161
Hg Kong	409	479	531	562	363
India	483	317	477	483	316
China M	14	8	10	182	282
U King	10	13	16	11	12
Czecho	24	23	33	41	41
Brazil	123	44	88	68	32
Belgium	41	20	29	40	27
China t	9	2	7	18	45
Singapr	272	276	61	91	88
All other	242	167	125	71	41
Total	2,429	2,089	2,263	2,988	2,409
	Value (1,000 dollars)				
Pakistn	1,239	1,286	1,541	2,835	2,392
Hg Kong	661	1,110	1,068	977	1,086
India	1,017	799	1,042	1,032	842
China M	59	30	34	340	681
U King	112	198	285	265	383
Czecho	86	82	125	177	197
Brazil	534	178	443	370	196
Belgium	281	214	246	320	187
China t	26	16	45	78	117
Singapr	229	298	108	110	111
All other	1,001	739	701	309	253
Total	5,244	4,950	5,638	6,813	6,445
	Unit value (per dozen)				
Pakistn	$1.55	$1.74	$1.74	$2.00	$2.06
Hg Kong	1.62	2.32	2.01	1.74	2.99
India	2.10	2.52	2.18	2.14	2.67
China M	4.11	3.74	3.34	1.86	2.41
U King	11.51	14.90	18.36	23.94	31.31
Czecho	3.60	3.53	3.79	4.35	4.77
Brazil	4.33	4.04	5.01	5.44	6.16
Belgium	6.77	10.82	8.60	8.10	6.81
China t	2.77	7.53	6.11	4.42	2.57
Singapr	0.84	1.08	1.77	1.21	1.27
All other	4.14	4.43	5.61	4.35	6.19
Average	2.16	2.37	2.49	2.28	2.68

1/ Does not include unornamented towels, imports of which were less than $500,000 annually, and shop towels.

Source: Compiled from official statistics of the U.S. Department of Commerce.

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Table 7.--Shop towels: U.S. imports for consumption, by principal sources, 1976-80

Source	1976	1977	1978	1979	1980
	Quantity (1,000 dozen)				
China M-----	54	0	729	1,170	3,727
Hg Kong-----	2,893	4,106	5,531	4,493	2,558
Singapr-----	1,846	1,362	1,678	1,358	732
Pakistn-----	271	251	88	264	362
China t-----	0	35	31	5	104
Japan-------	0	0	0	6	31
Hungary-----	0	0	0	0	29
Mexico------	133	53	124	48	0
Vietnam-----	0	0	0	31	0
Peru--------	0	0	0	5	0
All other---	23	5	9	5	0
Total---	5,225	5,822	8,191	7,399	7,694
	Value (1,000 dollars)				
China M-----	43	-	444	836	3,148
Hg Kong-----	2,580	4,066	5,260	4,879	2,986
Singapr-----	1,631	1,316	1,675	1,532	758
Pakistn-----	191	255	81	302	412
China t-----	-	38	27	5	98
Japan-------	-	-	-	44	33
Hungary-----	-	-	-	-	17
Mexico------	136	77	127	49	-
Vietnam-----	-	-	-	31	-
Peru--------	-	-	-	5	-
All other---	16	13	14	5	-
Total---	4,596	5,763	7,628	7,688	7,450
	Unit value (per dozen)				
China M-----	$0.80	-	$0.61	$0.71	$0.83
Hg Kong-----	0.89	0.99	0.95	1.09	1.17
Singapr-----	0.88	0.97	1.00	1.13	1.04
Pakistn-----	0.71	0.97	0.92	1.14	1.14
China t-----	-	1.07	0.86	1.04	0.94
Japan-------	-	-	-	7.09	1.04
Hungary-----	-	-	-	-	0.58
Mexico------	1.02	1.45	1.02	1.01	-
Vietnam-----	-	-	-	1.00	-
Peru--------	-	-	-	1.00	-
All other---	0.63	2.62	1.53	0.56	-
Average--	0.88	0.99	0.93	1.04	0.93

Source: Compiled from official statistics of the U.S. Department of Commerce.

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Table 8.--Towels: U.S. exports of domestic merchandise, by principal markets, 1976-80

Market	1976	1977	1978	1979	1980
	Quantity (1,000 dozen)				
Canada	440	359	247	219	207
Japan	264	212	141	292	173
U King	51	63	114	201	202
Fr Germ	75	34	72	92	124
S Arab	93	34	39	70	72
Austral	81	68	51	63	57
Italy	26	30	20	45	62
France	14	18	9	60	64
Switzld	9	10	22	45	41
Kuwait	43	26	38	59	50
All other	429	454	423	570	538
Total	1,525	1,308	1,177	1,716	1,591
	Value (1,000 dollars)				
Canada	5,795	5,094	7,109	6,768	8,339
Japan	4,177	3,913	3,705	7,724	5,132
U King	1,198	1,642	4,129	6,209	4,938
Fr Germ	1,236	635	1,927	2,769	3,275
S Arab	956	258	1,628	1,630	2,253
Austral	1,464	1,483	1,625	2,082	1,954
Italy	416	436	496	1,099	1,830
France	295	416	282	1,522	1,740
Switzld	139	231	847	2,201	1,688
Kuwait	526	517	818	1,216	1,575
All other	7,049	6,381	11,705	14,925	16,976
Total	23,251	21,007	34,272	48,146	49,700
	Unit value (per dozen)				
Canada	$21.95	$14.19	$28.74	$30.97	$40.34
Japan	15.82	18.46	26.27	26.42	29.65
U King	23.49	26.06	36.26	30.94	24.46
Fr Germ	16.48	18.68	26.62	30.15	26.36
S Arab	10.28	7.59	41.48	23.30	31.09
Austral	18.07	21.81	31.62	32.85	34.13
Italy	16.00	14.53	25.19	24.43	29.33
France	21.07	23.11	31.46	25.24	27.37
Switzld	15.44	23.10	38.85	49.39	41.17
Kuwait	12.23	19.88	21.80	20.45	31.41
All other	16.43	14.06	27.65	26.17	31.55
Average	15.25	16.06	29.13	28.05	31.24

Source: Compiled from official statistics of the U.S. Department of Commerce.

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SUMMARIES OF TRADE AND TARIFF INFORMATION

USITC PUBLICATION 841

COMPLETE LIST OF SUMMARIES PUBLISHED TO DATE IN SCHEDULE 3

Control No.	Publication date	Title
3-4-1	Jan. 1978	Fish Netting and Fishing Nets of Textile Materials
3-6-2	Jan. 1978	Sweaters
3-6-3	Jan. 1978	Body-supporting Garments
3-3-4	Feb. 1978	Broadwoven Fabrics of Manmade Fibers
3-1-5	Mar. 1981	Raw Cotton
3-5-6	Mar. 1981	Floor Coverings of Textile Materials
3-6-7	Mar. 1981	Men's and Boys' Shirts
3-4-8	April 1981	Knit Fabrics
3-3, 4-9	April 1981	Broadwoven Fabrics of Wool
3-1-10	August 1981	Manmade Fibers and Filament Yarns

BEST DOCUMENT AVAILABLE